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MARINE CORPS ORDER 1040R.31

From: Commandant of the Marine Corps
To: Distribution List

Subj: MARINE CORPS RESERVE ENLISTED RETENTION AND CAREER DEVELOPMENT PROGRAM

Ref: See enclosure (1)

Encl: (1) References
(2) Marine Corps Reserve Enlisted Retention and Career Development Program

1. Situation. To update policies and responsibilities governing enlisted retention within the Marine Corps Reserve.

2. Cancellation. MCO 1040R.35

3. Mission. To provide policy and procedural guidance for the management of enlisted retention within the Marine Corps Reserve.

4. Execution

a. Commander's Intent and Concept of Operations

(1) Commander's Intent. This Order provides instructions for the various programs for maintaining the career force of the Marine Corps Reserve.

(2) Concept of Operations. This Order provides the primary means for managing the retention of highly qualified enlisted Marines to meet our career force Military Occupational Specialty (MOS) requirements and for the Career Planning Program. Inherent in this duty is the commitment of our commanders and all Career Planners to maintain the integrity of our force by continuing to reenlist the "best and brightest" Marines into the career force.

b. Subordinate Element Missions. Commanders, Senior Enlisted Leaders and Career Planners must ensure adherence to the policies and procedures of this Order to maintain the highest quality reenlistment standards.

5. Administration and Logistics

a. This Order includes significant revisions and should be reviewed in its entirety. This Order is in compliance with references (a) through (am). References listed and not utilized within this Order have overarching relevance to enlisted retention within the Marine Corps Reserve.

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b. Privacy Act. Any misuse or unauthorized disclosure of Personally Identifiable Information (PII) may result in both civil and criminal penalties. The Department of Navy (DON) recognizes that the privacy of an individual is a personal and fundamental right that shall be respected and protected. The DON's need to collect, use, maintain, or disseminate PII about individuals for purposes of discharging its statutory responsibilities shall be balanced against the individuals' right to be protected against unwarranted invasion of privacy. All collection, use, maintenance, or dissemination of PII shall be in accordance with the Privacy Act of 1974, as amended (reference (ah) and implemented per reference (al)).

c. Records Management. Records created as a result of this Order shall be managed according to National Archives and Records Administration (NARA)-approved dispositions per reference (ae) to ensure proper maintenance, use, accessibility and preservation, regardless of format or medium. Records disposition schedules are located on the Department of Navy/Assistant for Administration (DON/AA), Directives and Records Management Division (DRMD) portal page at: <https://portal.secnav.navy.mil/orgs/DUSNM/DONAA/DRM/Records-and-Information-Management/Approved%20Record%20Schedules/Forms/AllItems.aspx>. Refer to reference (aj) for Marine Corps records management policy and procedures.

6. Command and Signal

a. Command. This Order is applicable to the Marine Corps Reserve.

b. Signal. This Order is effective the date signed.



M. A. ROCCO
Deputy Commandant for
Manpower and Reserve Affairs

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References

- (a) MCO 7220.12R
- (b) MCBUL 10120
- (c) MCO 1650.39B
- (d) MCO P1070.12K W/CH 1
- (e) DoD 7000.14-R, DODFMR Volume 7a, 'Department of Defense Financial Management Regulations,' (Date Varies)
- (f) NAVMC 1200.1E
- (g) MARADMIN 457/16
- (h) NAVMED P-117
- (i) MCO 6100.13A W/CH 2
- (j) MCO 1001R.1L W/CH 1
- (k) MCO 6110.3A W/CH 1 and Admin CH
- (l) MCO 5300.17A
- (m) MCO 1740.13D
- (n) MCO 1300.8
- (o) MCO P1700.27B W/CH 1
- (p) DoDI 1200.15, 'Assignment To and Transport Between Reserve Categories and Discharge From Reserve Status,' November 7, 2019
- (q) MCO 1900.16 W/CH 2
- (r) MCO 1001.52K
- (s) MARADMIN 548/16
- (t) DoDI 1332.29, 'Job Training, Employment Skills Training, Employment Skills Training Apprenticeships, and Internships (JTEST-AI) for Eligible Service Members,' January 24, 2014
- (u) 10 U.S.C. 509, 10211, 12301, 12306, 12310 (d), 12310
- (v) MCO P1400.32D W/CH 1-2
- (w) 50 U.S.C Chapter 49
- (x) Marine Corps Total Force Systems (MCTFS) Personnel Reporting Instructions Users Manual (PRIUM)
- (y) DoD Dir 1215.06
- (z) MCO 1560R.30B
- (aa) MCO 1510R.39B
- (ab) MCO 5000.12E W/CH 1-2
- (ac) MCO 1610.7A
- (ad) MCO 1001.62B
- (ae) SECNAV M-5210.1
- (af) SECNAVINST 5300.30F
- (ag) MCO 1306.16F
- (ah) 5 U.S.C. 552a, Privacy Act of 1974, as amended
- (ai) MCO 1020.34H
- (aj) MCO 5210.11F
- (ak) SECNAV NOTICE 5210
- (al) SECNAVINST 5211.5F
- (am) MARADMIN 228/06

Chapter 1

Introduction

1. Purpose

a. The Reserve career retention program is the key to achieving career force objectives within the Ready Reserve. The primary purpose of the program is to reenlist qualified Marines to meet the overall career force MOS requirements, and to retain the best qualified Marines to sustain appropriate career force experience levels. The primary enlisted career force objectives are:

(1) To sustain a career force inventory within the Marine Corps Reserve by grade and MOS that supports staffing of all authorized career force billets with the highest quality Marines possible by applying the "whole Marine concept". This career force inventory will be established for the three categories in the Ready Reserve: Active Reserve (AR), Selected Marine Corps Reserve (SMCR) and Individual Ready Reserve (IRR).

(2) To provide career force Marines with "career equitability," defined as equal promotion opportunity through the grade of Master Gunnery Sergeant/Sergeant Major. Marine Corps Reserve (MCR) promotion opportunities will continue to be determined by performance and organizational requirements.

b. The career retention program, although designed to fulfill Marine Corps Retention objectives, should be focused on the individual Marine. Each organization/unit must:

(1) Develop a retention strategy to facilitate the career development needs of each Marine.

(2) Expedite personal service for all Marines by ensuring interviews and administrative requirements contained in this Order are promptly and properly executed. Timely submission of retention documents will ensure that each Marine receives the best opportunity to be retained.

(3) Encourage Marines to remain active participants within the Selected Reserve in order to maintain MOS proficiency and competitiveness.

2. Organization. Career planning is a function of command. No unique organization exists to supplement the traditional chain of command; however, the following agencies and personnel exist within the Marine Corps to manage the Career Retention Program:

a. Headquarters, U.S. Marine Corps

(1) The Reserve Affairs Management Branch (RAM-1), Reserve Affairs Division (RA), adjudicates reserve reenlistments, extensions, lateral moves, incentives and Active Reserve Accession requests.

(2) Reserve Affairs Management (RAM-2) shall assign Active Reserve (AR) Career Planners (CP) as indicated on current Tables of Organization (T/O).

(3) Reserve Affairs Management Branch (RAM-3) provides support for the Individual Mobilized Augmentee (IMA) program to include career counseling services to Marines within the reserve component.

(4) Reserve Affairs Policy Branch (RAP) develops, promulgates, and manages manpower policies, procedures and guidance to achieve optimum end strength, inventory development, and staffing consistent with requirements and budget for the Marine Corps Reserve.

3. Responsibilities

a. Reserve Affairs (RA)

(1) Mission. Reserve Affairs reviews Reserve reenlistments, extensions, lateral moves, officer appointments on behalf of the Commandant of the Marine Corps (CMC); provides Reserve-specific expertise to other branches of HQMC; provides career guidance to individual Marines; and promotes improved retention processes in order to ensure the Marine Corps Reserve is capable of fulfilling its responsibility to augment into the total force Marine Corps.

(2) Functions

(a) Advises the CMC on Reserve enlisted retention matters via the Director, RA Division, and the Deputy Commandant for M&RA.

(b) Plans, publishes, and supervises the execution of regulations pertaining to enlisted retention in the MCR.

(c) Determines criteria and exercises authority on the processing of all requests received on enlisted members of the MCR.

(d) Exercises authority to approve or disapprove all requests for waiver of retention prerequisites with the exception of those identified as non-waiverable.

(e) Exercises authority on all prior service requests for off-contract waivers of reenlistment prerequisites.

(f) Exercises authority over cancellations of extension of enlistment agreements for members of the MCR.

(g) Maintains cognizance over this Order.

(h) Manages the administration of the online retention database for the MCR.

(i) Provides input for congressional correspondence and Reserve advisory opinion responses for the Board for Correction of Naval Records (BCNR) on matters pertaining to Reserve career retention.

(j) Provides guidance on enlisted retention matters for the MCR to all Commanding Officers/Inspector-Instructors, senior enlisted leaders, and CP staff non-commissioned officers in charge (SNCOICs) who make inquiries.

(k) Debriefs Reserve staff non-commissioned officer (SNCO) selection boards and provides relevant information to the MCR on the selection process.

(l) Provides career counseling for Reserve component Marines.

(m) Makes involuntary separation pay determinations for release from active service.

(n) Creates, maintains, and disseminates the Reserve retention campaign plan which consists of but not limited to the execution of the First Term Obligation Plan (FTOP) and Subsequent Term Obligation Plan (STOP).

(o) Hosts the annual Reserve Affairs Career Planning Working Group.

(p) Issue the appropriate RE-codes and final involuntary separations pay determination for AR Marines, as applicable.

b. Force Commanders

(1) Commanders are responsible for the implementation of a successful career retention program in accordance with the provisions of this Order.

(2) Commanders are encouraged to make every attempt to conduct programs that support retention to ensure that all Marines are aware of the opportunities available to them for retention (e.g., Retention Stand-down).

(3) Key factors that affect the success or failure of a Career Planning Program are command emphasis and attention, officer and staff noncommissioned officer participation and leadership, and the proper employment of Career Planners.

(4) Parent commands are responsible for Marines assigned to the Fleet Marine Force Personnel Assistance Program (FAP) and those Marines assigned Temporary Additional Duty (TAD). Commanders of both parent and host commands should pay particular attention to Marines who are in a FAP and TAD status to ensure the best interests of the individual and the Marine Corps are served.

c. Commanding Officer (CO)/Inspector-Instructor (I-I). Ultimate responsibility for the success or failure of a unit's retention program rests with the Commanding Officer (CO)/(I-I).

(1) Performance Evaluation. As a Special Staff Officer, the Career Planner will be evaluated by the Commanding Officer/Inspector-Instructor. The CO/I-I shall act as the Reporting Senior (RS) for Career Planners but may delegate this authority using the below guidelines:

(a) Commanding General Level Career Planners. The Chief of Staff is the lowest level of delegation permitted.

(b) Unit Level Career Planners. The Executive Officer/Assistant Inspector-Instructor is the lowest level of delegation permitted.

(c) Other Career Planners. Career Planners working in other billets where the command structure does not fit the options above should provide performance evaluations at the highest level possible.

(2) Measures of Effectiveness (MOE). The Commanding Officer can gauge the effectiveness of their retention program by utilizing the suggested MOEs as listed below. MOEs considered in absence of others may provide a skewed conclusion. Commanding Officers should consider the aggregate of several MOEs to gauge the effectiveness of the collective retention efforts of the unit.

- (a) Percentage of required interviews completed.
- (b) Number of reenlistments and incentives executed by unit members.
- (c) Percentage of unit comprised of non-obligors/obligors.
- (d) Number of separations/transitions.
- (e) Percentage of retention goal/mission achieved.

d. Career Planner Staff Non-Commissioned Officer In Charge (CP SNCOIC). The CP SNCOIC is responsible to the commander for administering the command career retention program by ensuring quality control on all retention request submitted to HQMC and training subordinate unit Career Planners. At a minimum, CP SNCOICs will be assigned to the following:

- (1) Force Level Commands
- (2) Major Subordinate Commands (MSC)
- (3) Major Subordinate Elements (MSE): Regiment, Group, and equivalent level commands

e. Career Planner (CP). The CP is responsible to the commander for administering the organizational/unit career retention program and is the commander's advisor on all enlisted retention matters. At a minimum, CPs will be assigned to Battalion, Squadron, and equivalent level commands.

f. Officers and Staff Non-Commissioned Officers (SNCOs). Officers and SNCOs assist commanders in administering a successful Reserve career retention program within the command. Officers and SNCOs in the command support the Reserve retention program through their strong leadership and influence. This support can include making liaison with the command CP and encouraging Reserve Marines to attend pertinent Reserve career retention briefs.

Chapter 2

Career Planning Personnel

1. Mission of Career Planners

a. The Career Planner is a special staff officer responsible directly to the commander for all matters regarding enlisted retention.

b. The primary mission of the Career Planner and Collateral Duty Career Planner is to advise commanders and Marines on all aspects of retention. This includes assisting Marines in improving their performance and competitiveness for promotion and retention through counseling and continuing education. The Career Planner will also process all requests for retention, including administrative requirements necessary to retain Marines.

c. The Career Planner is responsible to HQMC, to act as the liaison between the command and CMC HQMC (M&RA) on all retention matters. Accurate and timely submissions on behalf of the individual Marine via the online retention database is essential in ensuring CMC decisions are as informed as possible.

2. Selection of Career Planners

a. Every Marine Corps Reserve (MCR) PMOS 4821 Career Planner candidate is thoroughly screened by CMC (RA). The decision to accept a Marine for a lateral move into the Career Planning Force will be made based on the following criteria: performance, commander's recommendation, Career Planning MSC SNCOIC's recommendation, strength of the Marine's PMOS, and prerequisites that are met within the current Command Screening and Interview Guide for Career Planners.

(1) Commanders are encouraged to identify Marines who display the qualities of a Career Planner.

(2) Career Planners should exemplify the type of Marine we desire to retain in the Marine Corps. They must possess excellent initiative, strong communication skills, and the ability to work with minimal supervision. As a special staff officer, the Career Planner holds a position of leadership and integrity and should set the example in all aspects of performance and conduct.

(3) Marines desiring to lateral move into the 4821 MOS as a Career Planner should submit via the current retention system. The request will include a completed Command Screening and Interview Guide for Career Planners.

b. Upon selection to the Career Planning Force, each Marine will be assigned TAD to the Basic Career Planner Course. Every effort will be made to assign students to a class as soon as possible after being accepted into the Career Planning Force. However, the overriding factor will be the needs of the command to which the new Career Planner will be assigned (i.e., a Marine reporting to a command deploying in less than six months will receive priority). In some cases, the Career Planner will report to the new command for on-the-job training and subsequently attend school.

3. Assignment of Career Planning Personnel

a. Active Reserve Career Planner. HQMC (RAM-2) shall assign Marines with PMOS 4821 to fill T/O Career Planner billets. These billet assignments provide full-time career planner support to Marine Forces Reserve and subordinate units.

b. Collateral Duty Career Planner (CDCP). Commanders/I-Is shall assign Active Reserve (AR) or Active Component (AC) Marines as Collateral Duty Career Planners for units without an assigned PMOS 4821 Career Planner. However, special duty assignment pay and the issuance of the dress blue uniform allowance are not authorized per references (a) and (b). CDCPs should exemplify the type of Marine we desire to retain in the Marine Corps. They must possess excellent initiative, strong communication skills, and ability to work with minimal supervision. Additionally, CDCPs shall meet the following prerequisites prior to appointment:

(1) Be in the grade of E5 through E8.

(2) Possess a minimum of 24 months remaining on station at date of appointment.

(3) Possess current Secret security clearance eligibility and be verified by the unit security manager.

(4) Completion of the MarineNet Career Planner Course.

4. Additional Duty restrictions. All Marines routinely perform additional duties; however, Commanders and Inspector-Instructors shall not assign additional duties to Career Planning Personnel which will ethically compromise their career planning responsibilities or demand a preponderance of their time. Those additional duties include, but are not limited to, the following:

a. Restrictions applicable to PMOS 4821 Career Planners. Substance Abuse Control Officer (SACO), Legal NCO, Classified Material Systems (CMS) Custodian, Equal Opportunity Representative/Advisor (EOR/EOA), Sexual Assault Prevention and Response (SAPR), Uniformed Victim Advocate (UVA), Sexual Assault Response Coordinator (SARC), Uniformed Readiness Coordinator, Toys for Tots Coordinator, Billet Identification Code Manager (BIC), etc.

b. Restrictions applicable to Collateral Duty Career Planners. Substance Abuse Control Officer (SACO), Legal NCO, Equal Opportunity Representative/Advisor (EOR/EOA), Sexual Assault Prevention and Response (SAPR), Uniformed Victim Advocate (UVA), Sexual Assault Response Coordinator (SARC), Uniformed Readiness Coordinator, etc.

5. Training of Career Planning Personnel

a. All PMOS 4821 Career Planner selectees will attend the Basic Career Planner Course. Orders to attend this course are issued by HQMC (RA).

b. Marines assigned as a CDCP will attend the non-MOS producing Reserve Career Planner Course (RCPC) within one year of assignment. The COMMARFORRES CP SNCOIC will solicit nominations to attend the RCPC annually.

c. Advanced Career Planner Course (ACPC) is designed for Career Planners who currently are or will be taking on the functions and duties of a Career Planner SNCOIC. Once a Career Planner has obtained the rank of Staff Sergeant, they are required to attend the Advance Career Planning Course (ACPC) within 2 years or prior to assignment to a Career Planner SNCOIC billet, whichever is less.

6. Responsibilities of Career Planners

a. Career Planner

(1) Be familiar with the provisions of this Order, associated orders, publications, online retention database messages and directives.

(2) Ensure unit hierarchy is accurate in the online retention database.

(3) Perform required interviews on the occasions prescribed in this Order.

(4) Ensure accurate completion of all the administrative procedures and forms associated with career retention. These include, but are not limited to:

(a) Career Planning Contact Record.

(b) Enlistment/Reenlistment Document-Armed Forces of the United States (DD Form 4).

(c) Agreement to Extend Enlistment (NAVMC 321A).

(d) Appropriate Certificates (e.g., Discharge certificates, Reenlistment Certificates, Spouse Certificates).

(5) Conduct site assist visits within the command annually, at a minimum.

(6) Train and supervise CDCPs in administering the unit's career retention program.

(7) Ensure the CO and SgtMaj maintains situational awareness regarding all aspects of the unit's retention program by established measures of effectiveness (MOEs).

(8) Counsel Marines concerning career progression, retention, special duty assignments and incentives.

(9) Prepare and maintain career planning requests and records.

(10) Screen each Marine to determine eligibility relative to reenlistment, lateral moves, special duty assignments and incentive programs in accordance with established orders and directives.

(11) Coordinate all reenlistment ceremonies.

b. Career Planner SNCOIC. The role of the Career Planner SNCOIC is critical to an effective Career Planning Program. The responsibilities of the SNCOIC include, but are not limited to, the following:

- (1) Instruct and train subordinate Career Planners.
- (2) Facilitate the implementation of the retention plan within the command.
- (3) Provide assistance to Career Planners within the command.
- (4) Advise Commanders/I-Is on retention matters (e.g. Career Planner Strategy, Retention Reports, Retention Mission Attainment, Letters of Instruction, After Action Reports, Case Studies, etc.)
- (5) The SNCOIC shall conduct Career Planning evaluations using the current Career Planner Evaluation form to evaluate the effectiveness and knowledge of a Career Planner.
- (6) Conduct site assist visits and/or on-site inspections of Career Planners within the command annually, at a minimum.
- (7) Execute Career Planning functional area inspections in accordance with the Unit Inspection Program (UIP).
- (8) Conduct and document follow-on training for subordinate Career Planners.
 - (a) MSC Career Planner SNCOIC shall conduct training for subordinate unit Career Planners on a quarterly basis at a minimum.
 - (b) All other SNCOICs shall conduct training on a monthly basis at a minimum.
- (9) Gather and disseminate information for HQMC and unit Commanders/I-Is.
- (10) Conduct quality control on all Reenlistment/Extensions/Lateral Move (RELM) requests submitted by subordinate commands.
- (11) Coordinate the requirements of visiting agencies, e.g. monitor/Special Duty Assignment roadshows.

7. Working Area of Career Planners

a. The nature of career planning requires that the Career Planner's office receive special consideration. The Career Planner must have a dedicated office space located in an area that is readily accessible to all Marines during normal working hours and provides privacy during an interview. An office where conversation can be readily overheard is not conducive to establishing good rapport with a Marine being interviewed. Similarly, an office susceptible to frequent interruption by daily activity inhibits the Career Planner from creating the relaxed environment needed for assisting the individual Marine and identifying retention issues within the command.

b. The Career Planner will be provided with the computer assets needed to enhance the effectiveness of daily operations and to access the retention

system or other available on-line databases. In assigning an office for the Career Planner, commanders will consider these and other factors which could affect the unit's retention program. At a minimum, the following assets are required in order to perform daily career planning functions:

(1) Hardware/Software. Laptop with internet access, air card, external hard-drive, web camera, color printer, digital scanner, two Common Access Card (CAC) readers and Adobe Acrobat Pro.

(2) On-line Databases. Total Force Retention System (TFRS), Marine Corps Total Force System (MCTFS), Optical Digital Imaging (ODI), Marine Corps Training Information Management System (MCTIMS), Basic Orders System (BOS), Automated Message Handling System (AHMS), ReportNet, etc.

c. Career planning personnel are encouraged to obtain retention advertising material by contacting Marine Corps Recruiting Command.

8. Uniform for Career Planners

a. To enhance the prestige of Career Planners and to provide visibility for identification purposes, when in garrison, all Career Planners are encouraged to wear the seasonal dress blue uniform as appropriate.

b. Per reference (b), the medium blue uniform allowance is authorized every three years to all Career Planners who are assigned to an authorized T/O billet and are assigned PMOS 4821.

9. Recognition of Career Planning Personnel

a. Active Reserve (AR) Career Planner of the Year. The AR Career Planner of the Year is a CMC awards program to recognize an AR Career Planner for exceptional performance of their duties. This program consists of a board process where local Commanders/I-Is submit nominations to Reserve Affairs (RA) via the chain of command for consideration. DC (M&RA) will select the AR Career Planner of the Year and one runner up. Winners will be announced by CMC (RA). Nomination requirements will be published annually via a Marine Corps Administrative message based on criteria within the Combined Awards Order per reference (c).

b. Career Planning Certificate of Appreciation. To provide additional emphasis on retention and its importance to the Marine Corps, the Career Planning Certificate of Appreciation was designed as an additional means to recognize superior performance. It may be awarded in lieu of or in addition to other means of recognizing superior performance in support of the command retention program, such as meritorious masts or personal awards to any Marine, not just the CP or CDCP.

(1) Commanding Generals may award the certificate on behalf of the Commandant of the Marine Corps. Career Planning Certificate of Appreciation forms are available from the Reserve Affairs Service Level Career Planner.

(2) Commanders/I-Is may submit nominations for awards of the Career Planning Certificate of Appreciation to their respective MSC. Include complete justification for the award in all nominations.

Chapter 3

Counseling and Interviewing

1. Purpose. Each Marine shall have the opportunity to discuss their career options in a private setting with career planning personnel and the Commanding Officer/Inspector-Instructor.

a. Career planning interviews provide Marines the opportunity to discuss career related decisions. At this crucial time, the decision concerning retention and/or career enhancement opportunities must be approached with full awareness of what a Marine Corps career can provide.

b. The purpose of career planning interviews is three-fold:

(1) Identify each Marines' career related desires.

(2) Provide each Marine with all the appropriate information needed to make a sound career decision.

(3) Encourage quality Marines to submit for retention.

c. Interviews are important from the standpoint of gaining an understanding of the true reasons why Marines do or do not desire to be retained. By analyzing many similar interviews, the Career Planner and Commanding Officer/Inspector-Instructor can determine solutions to retention problems within a unit.

d. Interviews should enhance good will. Marines who are not retained will express their opinions about the Marine Corps upon reentering civilian life. These opinions, positive or negative, will affect future Marine Corps recruiting efforts. Through interviewing, Career Planners and Commanding Officers/Inspector-Instructors shall effectively identify and address issues.

2. Interviewing/Counseling Techniques. Interviewing techniques vary depending on the interviewer, the Marine to be interviewed, and the specific purpose of the interview. Techniques are taught in-depth at the Career Planner's Course and sustained by Higher HQ CPs. Career planning personnel shall review and rehearse interview techniques to maintain proficiency.

3. Interviewing/Counseling Process. Career Planners and Commanding Officers/Inspector-Instructors are responsible for conducting voluntary and required career retention interviews with all Marines in their command. The primary means to conduct these interviews is face-to-face. CO interviews can only be conducted after the completion of the CP interview.

a. Prior to the Career Planner interview, career planning personnel shall:

(1) Identify Marines to be interviewed via the Interview Management Module (IMM). Emphasis should be placed on "Due" and "Overdue" interviews.

(2) Review the Marine's personnel record and previous interviews via online databases.

(3) Review current career enhancement opportunities.

(4) Ensure location where interview will be conducted is private and without interruption.

b. During the Career Planner interview, career planning personnel shall:

(1) Utilize interview techniques.

(2) Accomplish the purpose of the interview, addressing any questions or concerns from the Marine.

(3) Ask for the strongest commitment possible.

(4) Make notes as necessary. Information discussed between the Career Planner and Marine will be transferred to the Reserve Career Planning Contact Record.

(5) Issue retention documents as necessary.

c. After the Career Planner interview, career planning personnel shall:

(1) Properly document the CP interview within the Interview Management Module (IMM) in the online retention database. This can be achieved by completing the interview electronically within the IMM or uploading a completed Reserve Career Planning Contact Record to the IMM. Signatures of the Marine and Career Planner are required. The preferred method to obtain signatures will be digital, utilizing dual CAC readers. Properly executed, interviews will provide a chronological record of:

(a) The Marine's basic qualifications for retention.

(b) The CP's evaluation and guidance to the Marine.

(c) The Marine's specific reason(s) for retention or transition.

(d) The recommended RE-Code (as applicable).

(2) Complete required follow-on action as necessary.

(3) Provide a copy of the completed CP interview to the CO/I-I prior to conducting the CO's interview (as applicable).

d. Prior to the Commanding Officer's interview, the CO/I-I shall:

(1) Identify Marines to be interviewed.

(2) Review the Marine's personnel record and previous interviews.

(3) Ensure location where interview will be conducted is private and without interruption.

e. During the Commanding Officer's interview, the CO/I-I shall:

(1) Accomplish the purpose of the interview, addressing any questions or concerns from the Marine.

(2) Make notes as necessary.

(3) Ask for the strongest commitment possible.

f. After the Commanding Officer's interview, the CO/I-I shall:

(1) Properly document the CO interview on the Reserve Career Planning Contact Record.

(2) The CO/I-I will sign the interview and return the completed document to career planning personnel. The preferred method to obtain signatures will be digital, utilizing dual CAC readers.

(3) Complete required follow-on action as necessary.

g. The career planning personnel shall transcribe the CO's recommendation and comments into the IMM within the online retention database. Career planning personnel will reconcile the CO's interview within the IMM. This can be achieved by completing the interview electronically within the IMM or uploading a completed Reserve Career Planning Contact Record to the IMM.

h. As a result of the geographical dispersion of units throughout Marine Forces Reserve, Career Planners and Commanding Officers/Inspector-Instructors are authorized to conduct interviews via online collaboration tools and telephonic communication only when conducting face-to-face interviews are not feasible. Interviews completed via online collaboration tools and telephonic communication will be captured within the online retention database and will comply with this chapter.

4. Types of Interviews. Interviews may be voluntary or required, and are conducted by either the CO/I-I or the CP/CDCP.

a. Voluntary Interviews. Voluntary interviews may be conducted at any time by the CP/CDCP or upon the request of individual Marines, whether or not they are eligible or recommended for retention. Voluntary interviews can be conducted to discuss a variety of topics. These interviews will be recorded electronically within the IMM or completed on Reserve Career Planning Contact Record and uploaded to the IMM.

b. Required Interviews. The CO/I-I and CP/CDCP will ensure interviews are conducted within the required timeframes for the prescribed occasions. Required interviews will be recorded electronically within the IMM or completed on a Reserve Career Planning Record and uploaded to the IMM. If a Marine has an approved retirement date reflected in MCTFS while an interview is "Due", the interview is not required, but must be reconciled within the IMM to prevent the interview from becoming "Missed".

5. Required Interviews

a. The prescribed required interviews will be conducted, as applicable, with all enlisted Marines, regardless of rank.

b. In cases where the CP and the CO/I-I are required to conduct interviews for the same occasion, the CP is required to conduct the CP interview prior to initiating the CO interview.

c. The monthly schedule for interviews will be published in a prominent place in the unit.

d. The prescribed occasions for interviews will be completed within the required time frames for each occasion. Interviews conducted after the required time frame for each occasion will be considered 'Missed'.

e. All prescribed interviews shall, at a minimum, educate the individual Marine on the following topics:

(1) Retention prerequisites to include enlisted career force controls.

(2) The need to have a complete and competitive performance record.

(3) Career enhancement opportunities to include Professional Military Education (PME) requirements for grade, career progression courses, and special duty assignments.

(4) Incentives for which the Marine is eligible based on current policies and programs.

(5) Available career paths: SMCR, IRR, AR, IMA and augmentation to the active component.

(6) Benefits of a career in the MCR, to include but not limited to obtaining a reserve retirement and Tricare Reserve Select.

(7) Eligibility requirements for Post-9/11 GI Bill, Transfer of Education Benefit (TEB), Montgomery GI Bill (MGIB), Montgomery GI Bill-Selected Reserve (MGIB-SR), Marine Corps Tattoo Policy and MOS eligibility requirements.

(8) For Marines entering, or currently in, the IRR: Updating contact information and changes in dependent status via Marine On-line (MOL) and Marine Corps Individual Reserve Support Activity (MCIRSA) points of contact.

f. SMCR/IMA Interviews. The CO/I-I and the CP are required to conduct interviews with all members of the SMCR/IMA for the following occasions:

(1) First Term Interview. The CP is required to conduct a first term interview with all Marines with a Reserve Component Code of K1 - K4, K8, K9, KA, and KB. This interview is not required for Marines who are past their Military Service Obligation (MSO). A First Term interview will only be conducted once in a Marine's career. Additional retention topics shall include the definition and explanation of the Mandatory Drill Participation Stop Date (MDPSD) and Military Service Obligation (MSO); Explanation of remaining contractual obligation to include service in the IRR; Continued SMCR affiliation and opportunities to continue drilling; Explanation of the First Term Obligation Plan (FTOP).

(a) For Marines with a future MDPSD, this interview is to be conducted between 1 July and 31 October immediately prior to the Marine's MDPSD.

Example: A Reserve Component Code KA Marine has a future MDPSD of 15 January 2021 (placing their MDPSD in FY21) and an MSO of 5 May 2022, the Career Planner would conduct the interview between 1 July and 31 October of 2020.

(b) For Marines without a MDPSD or with a MDPSD that has passed, this interview is to be conducted between 1 July and 31 October immediately prior to the Marine's MSO.

Example: A Reserve Component Code K2 Marine has an MSO of 5 May 2021 (placing their MSO in FY21) and no MDPSD, the Career Planner would conduct the interview between 1 July and 31 October of 2020.

(2) Careerist Interview. The careerist interview is a two-part interview required to be conducted by both the CP and CO/I-I with all Marines with a Reserve Component Code of K1 - K4, K8, K9, KA, KB, and KF. This interview is to be conducted between 1 July and 31 October immediately prior to the Marine's Reserve End of Current Contract (RECC). Additional retention topics shall include the retention submission timeframe based on current retention policies and the Subsequent Term Obligation Plan (STOP).

Example: A Reserve Component Code KA Marine has an RECC of 20 April 2020 (placing their RECC in FY20), the CP and CO/I-I would conduct their respective interviews between 1 July and 31 October of 2019.

(3) RECC Interview. The RECC interview is a two-part interview required to be conducted by both the CP and CO/I-I with all Marines with a Reserve Component Code of K1 - K4, K8, K9, KA, KB, and KF. This interview is to be conducted no earlier than 3 months prior to the month in which the Marine's RECC resides and no later than the Marine's RECC. This interview may be required multiple times during a Marine's contract. If a Marine executes reenlistment while an RECC interview is "Due", the interview is not required, but must be reconciled within the IMM to prevent the interview from becoming "Missed".

Example: A Reserve Component Code KA Marine has an RECC of 30 October 2021, the CP and CO/I-I would conduct their interview between 1 July and 30 October of 2021.

(4) Interview Precedence. If interview conflicts occur, the following rules will apply:

(a) First Term/Careerist. If a Marine is due for both a First Term and Careerist interview based on their MSO and RECC residing in the same FY, and a First Term interview has been conducted during their career, the Careerist interview will take precedence. If a First Term interview has not been conducted, the First Term interview will take precedence.

(b) First Term/RECC. If a Marine is due for both a First Term and an RECC interview, both interviews will be completed. The First Term interview must be completed first.

g. IRR Interview. The CP is required to conduct an IRR interview with all Marines with a Reserve Component Code of K7. This interview is to be conducted between 1 July and 31 October immediately prior to the Marine's Reserve End of Current Contract (RECC). The CP of the Employing Force Command (EFC) is required to conduct IRR interviews with activated (mobilized) members of the IRR in their command. For non-mobilized K7 Marines, this interview is only applicable to High Demand, Low Density (HDL) MOSs and needs of the Marine Corps Reserve based on current shortfalls within the operational forces. A list of targeted MOSs will be provided via the retention plan for the current Fiscal Year.

Example: A Reserve Component Code K7 Marine who holds a HDLD MOS has an RECC of 15 May 2021, the Career Planner would conduct the interview between 1 July and 31 October of 2020.

h. AR Interviews. AR interviews are two-part interviews required to be conducted by both the CP and CO/I-I with all Marines with a Reserve Component Code of B1-B4 for the following occasions:

(1) ARAP Interview. This interview is to be conducted between 1 June and 31 August prior to the fiscal year in which the Marine's ECC resides. Additional retention topics shall include retention submission timeframe based on current retention policies.

Example: A Reserve Component Code B1 Marine has an ECC of 30 December 2021, the CP and CO/I-I would conduct their interview between 1 June and 31 August of 2021.

(2) AR EAS Interview. This interview is to be conducted no earlier than 6 months prior to the month in which the Marine's EAS resides and no later than 3 months prior to the Marine's EAS. If a Marine executes reenlistment while an AR EAS interview is "Due", the interview is not required, but must be reconciled in the IMM to prevent the interview from becoming "Missed". Additional retention topics shall include involuntary separations pay and details regarding pre-separation requirements as applicable.

Example: A Reserve Component Code B1 Marine has an EAS of 15 April 2021, the Career Planner would conduct the interview between 1 October and 15 January of 2020.

i. The CP and/or the CO/I-I of the EFC are required to conduct interviews with members of the IRR, IMA and SMCR who serve as Extended Active Duty (EAD) recruiters (Component Code CD), Recruiter Aides (Component Code CE), and Active Duty Operational Support (ADOS) (Component Code CF) on the prescribed intervals listed above in paragraphs 5f and 5g.

j. Early Interviews. Due to the unique construct of the Reserve component and operational requirements, early interviews are authorized to be conducted no earlier than 60 calendar days prior to the start of the "Due" period for each required interview without approval from an MSC Career Planner. Early interviews will be completed in accordance with this chapter.

k. The CP and CO/I-I will make reasonable efforts to conduct interviews while they are in a "Due" status. If a required interview cannot be conducted prior to becoming "Missed", the Career Planner will make administrative notes depicting the circumstances in the IMM. These notes will be validated via signature by CP and CO/I-I in the IMM. The required interview will be conducted with the Marine at the earliest possible opportunity utilizing a voluntary interview in the IMM.

6. Delegation to Conduct Interviews. While the Commanding Officer/Inspector-Instructor is directly responsible for conducting interviews for all Marines within the command, it is not always feasible for the CO/I-I to conduct 100% of the interviews. In this instance, the CO/I-I must delegate, in writing, to the appropriate level (Commissioned Officers and Chief Warrant Officers) to conduct the interviews on their behalf.

a. Officers delegated authority to conduct interviews may only interview Marines over whom they have cognizance.

b. The CO/I-I must conduct the interview when a Marine is not recommended for retention.

c. Authority to conduct interviews will be retained at the highest level feasible.

Chapter 4

Reenlistment

1. General. Reenlistment involves the execution of a new contract by an enlisted Marine. This contract establishes a legal, binding agreement between the United States Government and the Marine. A reenlistment contract replaces either a current enlistment/reenlistment contract or one which has been terminated by separation.

a. There are three types of reenlistments for Marines: immediate, standard, and early.

(1) Immediate. A Marine reenlists with less than 90 days remaining on the current enlistment contract, to include extensions.

(2) Standard. A Marine reenlists with more than three months, but less than twelve months remaining on the current contract.

(3) Early. A Marine reenlists more than 12 months prior to the end of their current enlistment contract, to include extensions. Early reenlistment may be authorized for:

(a) Marines in receipt of Permanent Change of Station Orders (PCSO)/AR accession orders requiring additional obligated service.

(b) Marines approved for incentives and/or training based on current policies and programs.

(c) Marines who need additional obligated service for mobilization/deployment/ADOS.

(d) Marines with over 18-years of service who are selected for promotion requiring two years of additional service.

(e) Marines who are qualified and elect to transfer education benefits under the Post-9/11 GI Bill.

b. A Marine must reenlist prior to midnight of the last day of his/her current enlistment/extension. The reenlistment will be effective on the day following the date of separation.

(1) Marines not on active duty, who reenlist in the Marine Corps Reserve, may be administered the reenlistment oath up to 30 days in advance of the effective date of reenlistment.

(2) Marines being discharged from active duty who reenlist in the Marine Corps Reserve, may be administered the reenlistment oath up to 30 days in advance of the effective date of reenlistment. Marines taking leave awaiting separation may be sworn into the Marine Corps Reserve immediately prior to the start of leave with the effective date of reenlistment on the day following date of discharge.

c. Upon reenlistment, Reserve Marines who are serving on active duty over 30-days may elect to sell back their accumulated leave balance utilizing Lump Sum Leave (LSL) in accordance with reference (e).

2. Reenlistment Lengths. Reenlistment length is considered based on the Marine's service record and the needs of the Marine Corps.

a. A 12-month reenlistment may be granted for Active Duty and Prior Service off contract Marines who meet reenlistment prerequisites and have exceeded their MSO to join the MCR. CMC (RA) may grant a 12-month reenlistment on a case-by-case basis.

b. Standard reenlistment lengths are 24, 36, or 48-months.

(1) CMC (RA) may assign a 24-month reenlistment authority to Marines for further observation (FFO). Marines assigned an FFO, may not submit for reenlistment until they are within 90-days of ECC/RECC or as directed by current retention guidelines. A draw case code of BF will be entered into MCTFS. CMC (RA) may grant a 24-month reenlistment on a case-by-case basis.

(2) A 36-month reenlistment is the maximum amount of time that will be granted for SMCR/IMA/IRR Marines with over 20 satisfactory years of service and AR Marines with over 20 active duty years.

c. A 60 or 72-month reenlistment may be granted for special programs only (e.g. career progression courses, incentives, etc).

d. If a standard reenlistment length cannot be executed, CMC (RA) may grant reenlistment in non-standard reenlistment increments. This provision will only be used when the execution of an extension or standard reenlistment cannot fulfill a specific obligation or requirement. Non-standard reenlistment lengths will not be approved for less than 12 months.

3. Reenlistment Authority. Reenlistment authorizations are dependent on the applicant meeting all eligibility criteria for reenlistment. Reenlistment authority must be obtained from CMC (RA) via the online retention database. Upon receipt of approval of authority to reenlist a Marine, the CO/I-I is authorized to separate the Marine per reference (e), for the express purpose of reenlistment. The following reenlistment authority is delegated by RA: COs/I-Is are authorized to reenlist Active Duty (comp code 11) Marines into the Marine Corps Reserve for a period of 1 year provided the Marine has completed, or will complete, their Military Service Obligation (MSO/EOS) upon reaching their ECC/EAS. These Marines must meet all reenlistment prerequisites as outlined in chapter 4, paragraph 4 of this Order. It is at the CO's/I-I's discretion to utilize this authority particularly when there are questions about a Marine's eligibility. In these instances, requests for reenlistment should be forwarded to RA for adjudication.

4. Reenlistment Eligibility Criteria

a. General. CO's/I-Is will carefully consider applications for reenlistment prior to submitting reenlistment requests. Waivers of eligibility prerequisites are outlined in paragraph 7 of this chapter.

b. Basic Reenlistment Prerequisites. The basic prerequisites pertain to all Marines applying for reenlistment. Some prerequisites may be waived by HQMC for otherwise highly qualified Marines seeking reenlistment, but there should be no assumption that such waivers will be forthcoming. The Marine must satisfy the following prerequisites prior to submitting a request for reenlistment:

(1) Have demonstrated the high standards of leadership, professional competence, appearance, and personal behavior required to maintain the prestige and quality standards of the Marine Corps.

(2) Have demonstrated the core values of honor, courage and commitment.

(3) Meet MOS security clearance requirements per reference (f). This will not be waived by HQMC.

(4) Be worldwide deployable and fit for rigorous combat duty at sea and on foreign shore unless previously waived by an expanded Permanent Limited Duty (PLD) board per reference (g). This may not be waived by HQMC. HIV positive Marines are excluded from this prerequisite. Commanding Officer's certification remains "yes" to protect Marine's privacy.

(5) Must have one year or less remaining on their current contract or extensions of current contract, unless specified by current retention policies.

(6) Meet medical/dental standards as prescribed in reference (h). Provided the Marine is otherwise qualified for reenlistment, an extension may be requested for sufficient time to obtain treatment to meet prescribed dental standards. This will not be waived by HQMC.

(a) HIV positive status will not be used to deny reenlistment in the Ready Reserve.

(b) Marine must be in full duty status and have a current Periodic Health Assessment within one year from date of submission.

(c) Prior service applicants who have been separated from active duty and/or drill status within 36 months and whose separation from active duty and/or drill status was not related to a medical condition, must complete a DD 2807-1, "Report of Medical History" in accordance with reference (h).

(7) Pass a full, current Physical Fitness Test (PFT) and Combat Fitness Test (CFT) in accordance with reference (i), unless previously waived by an Expanded Permanent Limited Duty (PLD) board per reference (g). Marines who do not have a full, current PFT or CFT within MCTFS due to being unqualified or exempt during the previous semiannual period in which the event was required, must provide verification of a completed PFT/CFT via a scoresheet in accordance with reference (i). This will not be waived by HQMC.

(a) Prior service off contract applicants and members of the IRR not on active duty orders are not required to have a completed PFT or CFT at the time of reenlistment request.

(b) Members of a Mobilization Training Unit (MTU) are required to annually complete and pass the PFT and CFT per reference (j). This will not be waived by HQMC.

(8) Meet Body Composition Program (BCP) and Military Appearance Program (MAP) standards as prescribed by reference (k). This may not be waived by HQMC, unless previously waived as outlined within reference (k).

(9) Have no incidents involving confirmed illegal use, possession, sale, or distribution of a controlled substance and/or have no confirmed incidents involving "wrongful" use of any chemical compound, when use is defined as drug abuse or drug uses per reference (l). This will not be waived by HQMC.

(10) Not be a conscientious objector. This will not be waived by HQMC.

(11) Have no known dependency or hardship that is not temporary in nature and that causes the Marine to be non-deployable or not available for worldwide assignment at any time. This will not be waived by HQMC.

(12) Not have been assigned to any alcohol treatment program, per reference (l), during the past 12 months. In these cases, Marines may request an extension for up to 12 months to allow time to complete their aftercare treatment programs and to allow the command to observe their performance and conduct. The observation period begins on the date Marine completes alcohol treatment. Career Planners must confirm the completion date of the In/Out patient or resident treatment. This restriction does not apply to Marines who volunteer for treatment and have no performance or conduct problems. Failures of the alcohol treatment program are ineligible for reenlistment. This will not be waived by HQMC.

(13) Marines who are single parents and have custody of their children or dual military couples with dependents are required to comply with the instructions contained in reference (m), which provides specific requirements for maintaining current family care plans in the event of mobilization/deployment/TAD. This will not be waived by HQMC.

(14) Must not fall under the provisions of the Lautenberg Amendment (Firearms Prohibitions and Domestic Violence Convictions). Refer to the current directives in regards to domestic violence and domestic abuse. This will not be waived by HQMC.

(15) Have no fitness report date gap or missing fitness report of 31 days or more within the last three years. This is verified using the Manpower Management Records and Performance (MMRP) fitness report inventory tool. A fitness report in processing status will be considered incomplete. This will not be waived by HQMC.

(16) Recertified Career Retirement Credit Report within 12 months of submission of reenlistment request to HQMC (RA). This will not be waived by HQMC.

(17) Not be a sole surviving son/daughter. However, a Marine may waive this status per reference (n).

(18) Have a minimum proficiency and conduct mark average of 4.0/4.0 during the current contract and extension to that contract.

(19) Must not be under a CMC imposed reenlistment restriction.

(a) The following reenlistment (RE) codes are not considered restrictive for reenlistment in the MCR: RE-1A, 3N, 3O, and 3V.

(b) The following reenlistment (RE) codes are considered restrictive for service in the MCR and require a waiver of reenlistment prerequisites for further service: RE-3A, 3B, 3C, 3E, 3F, 3H, and 3P.

(c) The following reenlistment (RE) codes are considered restrictive for service in the MCR and are non-waiverable for further service: 4, and 4B.

(d) All other reenlistment codes will be considered on a case-by-case basis and do not require a waiver.

(20) Have no more than two NJPs on current contract.

(21) Have no convictions by court-martial during the current contract and extension to that contract.

(22) Have no known convictions by civil authorities (foreign or domestic) or action taken which the maximum penalty, if the member would have been charged under the UCMJ, would have been confinement for six months or more, or a fine of \$500 or more. If the offense is not listed in the Manual for Courts Martial (Table of Maximum Punishment) or is not closely related to an offense listed there, apply the maximum punishment authorized by the U.S. Code or the District of Columbia Code, whichever is lesser. This restriction is only subject to the current contract and extension to that contract.

(23) Have no alcohol-related incidents while operating a vehicle or any other mode of transportation on or off base. This restriction is only subject to the current enlistment contract and extensions to that contract.

c. First Term. In addition to the basic reenlistment prerequisites, Marines serving on their initial enlistment, including extensions of the initial enlistment, must have completed Marine Combat Training and obtained a Primary MOS. This will not be waived by HQMC.

d. Career Marines. In addition to the basic reenlistment prerequisites, Marines who have previously reenlisted and qualify for retirement are required to attain 50 points annually during their anniversary year per reference (p).

e. Prior Service Off Contract Applicants. In addition to the basic reenlistment prerequisites, off contract applicants must meet the following prior to reenlistment:

(1) Not be above the grade of sergeant.

(2) Must not have been discharged from the Marine Corps or MCR for period of 3 years or more.

(3) Must possess grade/MOS for the assigned billet with the SMCR/IMA or agree to attend a course of instruction to qualify for the required MOS.

(4) Must have a constructive age of 32 years or less at the time of reenlistment. Constructive age is calculated as follows: Applicant's real age minus total active service in the Marine Corps, Army, Navy, Air Force and Coast Guard, including service in Reserve components (SMCR or equivalent). This will not be waived by HQMC.

(5) Have less than 20 years qualifying service. This will not be waived by HQMC.

(6) Must not exceed the current MCR service limitation policy. This will not be waived by HQMC.

f. Pregnant Marines (including postpartum period). Those Marines who were otherwise qualified for retention prior to becoming pregnant warrant an exception to the following reenlistment prerequisites: height/weight/body fat standards, passing a current PFT, and be deployable worldwide. This is a blanket exception to reenlistment prerequisites and does not require a waiver.

5. Service Limitations

a. Service limitations in the MCR (excluding AR Marines) are based on two criteria: qualifying service and total federal service.

(1) A qualifying year (satisfactory year, or sat year) of federal service is defined as a year of federal service qualifying for retirement when a Reserve Marine is credited with a minimum of 50 Reserve retirement points during an anniversary year.

(2) Total federal service is defined as the sum of all periods of time during which the Reserve Marine is a member of the Armed Forces (in most cases where there is continued service this is based on Pay Entry Base Date (PEBD)).

b. All service spent as prior service other service (PSOS) time will be considered when determining service limits for applicants to the MCR.

c. The grade held determines the number of years of service authorized.

(1) The following depicts MCR service limitations by grade at the time of reenlistment, to include the period of reenlistment/extension contemplated:

<u>GRADE</u>	<u>LIMIT OF SERVICE</u>
Cpl	8 years qualifying service
Sgt	13 years qualifying service
SSgt	20 years qualifying service
GySgt	22 years qualifying service
1stSgt/MSgt	27 years qualifying service
SgtMaj/MGySgt	30 years total federal service

NOTE: An accurate Career Retirement Credit Report will reflect total qualifying years of service for each Marine in accordance with references (j) and (q).

NOTE: "30 years total federal service" applies to all ranks as a maximum service limitation.

(2) Waivers of the service limitations detailed in paragraph 5c(1), may be granted in exceptional cases and only where there is a critical Marine Corps need by grade and MOS.

(a) Waivers of service limitations based on qualifying years of service by grade must be requested to RA via the first Commanding General in the Marine's chain of command.

(b) Waivers of service limitations to exceed 30 years total federal service must be requested to Deputy Commandant, Manpower and Reserve Affairs via the first Commanding General in the Marine's chain of command.

(c) Exception. RA is authorized to approve all waivers of service limitations for one month (30 days) for the purpose of retirement, without a Commanding General's endorsement; provided at no point the Marine's RECC is 60 days or more past service limitations. This includes 30 years of total federal service.

d. The service limits for AR Marines are contained in reference (r).

6. Maximum Age Limitations

a. Reenlistment/extension will not normally be approved for a period which will result in service past the last day of the month in which the applicant will attain age 60, except where the SNCO has more than 18 qualifying years and will not become eligible for transfer to the Reserve Retired List prior to attaining age 60.

b. In accordance with reference (q), additional service for Marines who meet the requirements of paragraph 5c(1) above, may be authorized to the first day of the month following the Marine's 62nd birthday.

7. Waivers of Reenlistment Prerequisites

a. General

(1) Marines requesting reenlistment who do not meet basic reenlistment prerequisites contained in this Order may request consideration for a reenlistment waiver, unless the waiver is requested for a non-waiverable prerequisite. All waiver requests will be from the individual Marine to CMC (RA) via the first Commanding General, or Chief of Staff, within their chain of command. The reenlistment request with CG endorsement will be submitted via the online retention database.

(2) The "whole Marine" concept will be employed to provide an objective evaluation of each waiver request. In each case, the needs of the Marine Corps will take precedence. The waiver process is not intended to be an administrative process to reenlist unqualified applicants. When evaluating a Marine's value to the Marine Corps, the CO/I-I and CG must use the following criteria:

(a) Overall performance, past and present.

(b) Individual initiative towards correcting the basis for ineligibility.

(c) Future potential as a career Marine.

(3) Approval for the waiver of the reenlistment prerequisites will be granted only to those Marines who are exceptionally qualified and possess critical skills or experience required by the MCR.

(4) Any disqualifying factor for which the Marine was previously granted a reenlistment waiver by RA will not, in itself, disqualify the Marine from reenlistment. However, such disqualifying factors will be considered in evaluating the "whole Marine concept."

b. Waiver of physical standards due to wounds received in combat. Marines who are combat wounded and subsequently found unqualified by Physical Evaluation Board (PEB) and desire reenlistment may submit a reenlistment request in accordance with current guidance pertaining to reenlistment of combat wounded Marines, reference (am) as of this Order's publishing.

8. Off-Contract Accessions (OCA)

a. General

(1) Prior Service Off-contract applicants must meet the reenlistment prerequisites contained in this order. In those cases where the applicant is determined to be not qualified for reenlistment, a request for waiver of reenlistment requirements may be submitted unless waiver of the appropriate reenlistment prerequisite is prohibited. The waiver process is not intended to be an administrative process to reenlist unqualified applicants.

(2) Approval for the waiver of the reenlistment prerequisites will be granted only to those applicants who are exceptionally qualified and possess critical skills or experience required by the MCR.

(3) OCA requests will only be considered for critically understaffed MOSs as determined by RAP.

(4) Lateral move requests from OCAs will only be entertained when the applicant is affiliating to an SMCR billet.

b. OCA Request Format

(1) A statement from the applicant requesting reenlistment. The applicant should include any additional favorable material which is considered pertinent to the request.

(2) Endorsement from Commanding General:

(a) Marines affiliating to the SMCR/IMA must be endorsed by the first Commanding General in the Marine Corps Recruiting Command chain of command, or their Chief of Staff, prior to being forwarded to RA.

(b) Marines affiliating to the IRR must be endorsed by Commanding General, Force Headquarters Group, or their Chief of Staff, prior to being forwarded to RA.

(3) A current photograph in appropriate civilian attire comparable in degree of formality as the uniform prescribed for promotion photographs per reference (s).

(4) An accurate statement of service reflecting all periods of service if a Career Retirement Credit Report is not available.

(5) Copies of release or discharge documents for all periods of previous service including PSOS.

(6) Copies of all official service records from any branch of the military in which the applicant previously served. Copies may be obtained from the National Personnel Records Center by the applicant.

c. Reenlistment. Off contract applicants may be reenlisted into the MCR for a period of one, two, or three years upon approval from RA.

d. Grade and Date of Rank. Guidelines for determination of grade and date of rank for off contract applicants enlisting/reenlisting in the MCR are as follows:

(1) If reenlisting in the MCR within 12 months after separation from the Marine Corps/MCR, the applicant will be reappointed to the grade held at the time of separation and will retain the original date of rank.

(2) If reenlisting more than 12 months but less than 3-years after separation from the Marine Corps/MCR, the applicant will be reappointed to the grade held at time of separation. Date of rank for corporals and below will be constructed by crediting all prior service in grade. Date of rank for sergeants and above will be constructed by crediting one-half of prior service in grade.

(3) If reenlisting three years or more after separation from the Marine Corps/MCR, the applicant will be reappointed to the grade held at time of separation. The date of rank will be the date of reenlistment.

(4) Inter-service transfer enlistees will normally be appointed to the grade held at time of separation from the Marine Corps/MCR. Grade and date of rank for all applicants will be determined under the same guidelines as an OCA.

9. Commanding Officer's Recommendation

a. COs/I-Is are required to submit a reenlistment request for all Marines, regardless of recommendation. The request must be submitted via the online retention database to RA for final determination.

b. All requests for retention must include the CO's recommendation to ensure the "whole Marine concept" is evaluated when being considered for retention.

(1) Recommendation. The CO's recommendation plays a crucial role in the reenlistment decision. The recommendation should take into consideration the Marine's performance and conduct as it relates to rank, age, experience, and maturity level. The primary role of the CO's recommendation is to provide the key initiation of dialogue between the CO and CMC, contributing to the reenlistment decision as it relates to the Marine's current performance and potential. CMC is responsible for affording due consideration to the CO'S recommendation while considering the Marine's entire service record. Although a recommendation of "not recommended" does not disqualify a Marine for reenlistment, the importance of this recommendation cannot be overemphasized and will be thoroughly considered. The CO's recommendation consists of four parts:

(a) Certification of Reenlistment Prerequisites. The Commanding Officer will certify whether the requesting Marine meets reenlistment prerequisites and all information contained within the RELM request is valid and accurate.

(b) Recommended for Request. The Commanding Officer will recommend or not recommend the Marine's request.

(c) Commander's Tier Evaluation. The Commanding Officer's tier evaluation will be one of the four types listed below:

1. Tier I. Does superior work in all duties. Even extremely difficult or unusual assignments can be given with full confidence that they will be handled in a thoroughly competent manner. Demonstrates positive effect on others by example and persuasion. A Tier I Marine may not have any NJP, court martial, or civilian conviction on his current contract.

2. Tier II. Does excellent work in all regular duties, but needs assistance in dealing with extremely difficult or unusual assignments. Demonstrates reliability, good influence, sobriety, obedience, and industry. A Tier II Marine may have only one form of jeopardy on contract in the form of NJP or misdemeanor civilian conviction, but may have no courts martial.

3. Tier III. Can be depended upon to discharge regular duties thoroughly and competently but usually needs assistance in dealing with problems not of a routine nature. A Tier III Marine may have no more than two incidents of jeopardy in the form of NJP or misdemeanor civilian conviction, but have no courts martial conviction.

4. Tier IV. May or may not meet minimum standards. Any Marine with a courts martial conviction will be categorized as Tier IV.

(d) Comments to HQMC (RA). COs/I-Is will use the comment section to provide amplifying remarks to HQMC. COs/I-Is must indicate the reason for not recommending a Marine or evaluating a Marine as a Tier IV.

(2) The CO's recommendation section will contain the CO's name, rank, email address, and phone number.

(3) Unobtainable source documentation (i.e., page 12, UPB, etc) directly related to a Marine's reenlistment must be annotated in a statement by the CO/I-I. This statement will be included in the CO's recommendation.

10. Submission Procedures

a. Career Planners are required to thoroughly screen each Marine prior to creating a RELM. Proper screening ensures the Marine meets reenlistment prerequisites.

b. Requests for reenlistment will be submitted between 12 months and three months prior to the Marine's current RECC/ECC/EAS unless otherwise authorized by current submission guidelines.

c. Forward requests for retention to RA via the online retention database.

d. All retention requests will include a complete Reserve RELM request form with supporting documentation as outlined by RA. RA will publish FY RELM submission guidelines with amplifying instructions on administrative requirements for submission. All requests must comply with the current FY RELM submission guidelines.

e. CPs desiring to check on the status of a retention request, should allow 30 working days following receipt by RA. After 30 working days, inquiries may be directed to RA via the CP SNCOIC. Contact the CP SNCOIC if time becomes a detrimental factor for a particular RELM. The CP SNCOIC may contact the appropriate RA Retention Liaison for assistance.

f. Required entries by the CP are as follows:

(1) CPs shall complete all sections as applicable on the RELM in the online retention database.

(2) Within the CP Comments section, the CP shall address data that is not current or incorrect.

(3) CPs shall state the nature of the request (e.g., requesting a 48-month reenlistment with monetary incentive).

(4) Any waivers of reenlistment prerequisites. Information required for waiver consideration shall be attached to the RELM for consideration by RA.

(5) Any additional pertinent information not covered by specific instructions.

11. Administrative Procedures

a. COs/I-Is shall certify all reenlistment packages by signing the reenlistment authority prior to executing the authority. Reenlistment shall not be executed when, in the opinion of the CO/I-I, the Marine authorized to be reenlisted has failed to maintain the high standards of professionalism, personal performance, and core values after the authority for reenlistment was granted. In such cases, the Command must immediately inform CMC (RA) of the circumstances surrounding the decision not to reenlist the Marine and provide justification. RA will provide instructions on the proper procedures to follow under such circumstances.

b. DD Form-4 will be created in accordance with reference (d). The reference number on the approved RELM is the authority to be entered on the DD Form-4.

c. All documents and certificates should be created and reviewed prior to execution of the approved reenlistment.

d. A copy of all executed documents will be uploaded to the online retention database.

e. DD Form-4 will be distributed in accordance with appendix (c).

f. USMC Certificate of Reenlistment. The United States Marine Corps Certificate of Reenlistment should be presented to all standard re-enlistees in the MCR on the date the oath is administered at an appropriate ceremony.

Certificates can be ordered through normal supply channels. Instructions for the completion of the Certificate of Reenlistment are as follows:

(1) Marine Information. Where possible, provide distinctive lettering. On the line provided, the Marine's Rank, First Name, Middle Initial, and Last Name (including generational designation, as required) will be centered and typed in all capital letters, as shown in the examples below:

STAFF SERGEANT JOHN A. MARINE
GUNNERY SERGEANT JOHN R. LUIS JR.

(2) Date. On the lines provided, type the date presented using all capital letters.

(a) The number of the day will be in ordinal format, e.g. **1ST, 2ND, 3RD**, etc.

(b) The month will be spelled out, e.g. **JANUARY, FEBRUARY**, etc.

(c) The year will be in 4-digit format, e.g. **2021, 2022**, etc.

(d) Signature. On the line provided, type the Commanding Officer's Name, Rank and branch of service as shown below.

JOHN A. STONE, LTCOL, USMC

g. Honorable Discharge Certificate. Present the Honorable Discharge Certificate on the date the Marine is administered the oath of enlistment. Refer to reference (q) for instructions on completing the certificate. NOTE: Only Marines who are serving beyond their Expiration of Obligated Service (EOS) will be issued this certificate.

h. Reenlistment Ceremony. Reenlistment is a major event in the career of an enlisted Marine. An appropriate, meaningful ceremony should be held. Every attempt should be made to honor the Marine's desire regarding the time and location of the ceremony; family, special guests, and fellow Marines should be invited. The following sequence of events are considered appropriate:

(1) The Marine will be discharged by reading the Honorable Discharge Certificate. This is applicable for Marines who are past their EOS. As a right of observance only, Marines may be given the opportunity to speak as a civilian.

(2) A commissioned officer or chief warrant officer 2 or above in a regular, reserve, or retired status of the U. S. Armed Forces must administer the oath of enlistment.

(3) The Reenlistment Certificate will then be read acknowledging the Marine's acceptance for reenlistment.

i. Other Recognition. Commanders should personalize the occasion with other recognition as appropriate.

(1) Spouse Certificate of Appreciation. At the discretion of the individual Marine, prepare the form and present to the Marine's spouse during the reenlistment ceremony.

(2) At the commander's discretion, the re-enlistee may be granted a social gathering after the ceremony.

12. Denial of Further Service

a. Only the CMC (RA) holds the authority to deny further service to career or first term Marines. AR Marines denied further service may be authorized an extension as appropriate to allow for transition time.

b. Per reference (q), the CMC (RA) will make involuntary separations pay determination on each career Marine who is denied further active service. Involuntary separation pay is intended to assist Marines who are denied further service to facilitate a seamless transition to civilian life. Reference (t) contains the criteria used to determine the qualification for and level of involuntary separation pay for which the Marine is eligible (i.e., full, half, or zero).

c. CMC (RA) will assign a reenlistment code to each AR Marine who is denied further service per reference (q).

d. Reconsideration. CMC (RA) will reconsider any decision. Requests for reconsideration from the individual Marine must be endorsed by the first Commanding General within the Marine's chain of command and contain amplifying information not presented in the initial request.

Chapter 5

Extension of Enlistment

1. Voluntary Extensions of Enlistment

a. General. Voluntary extensions of enlistment are executed in monthly increments. Marines cannot exceed 48 months of extensions on each contract per section 509 of reference (u).

b. Purpose. Extensions are intended to provide sufficient obligated service to allow a Marine to serve a tour of specified length. They are not to be used in lieu of reenlistment. The following are examples where extensions may be warranted:

(1) To obtain sufficient obligated service upon graduation from MOS producing school.

(2) To obtain sufficient service to participate in specific exercises, operations, or unit deployments.

(3) To qualify for reenlistment or transition.

(4) To qualify for transfer to the FMCR or Reserve Retired List (RRL) for retirement.

(5) A Marine who is pregnant, or whose spouse is pregnant, may request an extension to receive medical benefits, provided their service has been satisfactory. To qualify for this extension, the pregnant Marine, or spouse, must be scheduled to deliver after the Marine's EAS/RECC. This is only applicable to extensions of EAS for AR Marines or RECC of pregnant SMCR/IMA/IRR Marines.

(6) A Marine who has been assigned to an out-patient or resident treatment substance abuse program may request an extension to allow completion of the program and/or aftercare treatment program. This does not preclude Marines who complete substance abuse treatment from requesting retention upon completion of the program.

(7) To gain sufficient obligated service to qualify for a specific assignment or for valid humanitarian purposes.

(8) To gain sufficient obligated service to qualify for an incentive.

(9) To meet obligated service requirements for promotion per reference (v).

(10) To obtain sufficient service to become full duty when classified per reference (j) as Temporary Not Physically Qualified (TNPQ)/ Temporarily Not Dentally Qualified (TNDQ)/Not Physically Qualified (NPQ).

(a) RA may grant additional service not to exceed twelve months from date disease/injury incurred for SNM to complete TNPQ/TNDQ.

(b) RA may grant additional service for Marines in an NPQ status to await results of Physical Evaluation Board (PEB).

(11) To gain sufficient service to await determination of legal proceedings.

2. Extension Authority. Extension authority must be obtained from CMC (RA) via the online retention database. RA authority to extend will remain effective until the No Later Than (NLT) date issued in the text of the extension approval. The following extension authority is delegated by RA:

a. Local Command Authority. Provided the authorized term of extension does not result in total service beyond service limitations or exceed 48 months of total extensions on a contract and if otherwise eligible, COs/I-Is may approve the following short-term extensions of enlistment:

(1) Three months, on a one-time basis per contract for SMCR/IMA/IRR Marines in order to meet reenlistment prerequisites. May only be executed when a Marine is within 90 days of their RECC and does not meet reenlistment prerequisites.

(2) Three months, on a one-time basis per contract for AR Marines to await response from HQMC on a submitted retention request. The submitted retention request must be at HQMC (RA) in a pending status in the online retention database. May only be executed when a Marine is within 30 days of their EAS and may not carry a Marine past 18 years of active service.

(3) Three months following a fit for full duty determination by a PEB or removal from a limited duty status.

(4) Three months following the removal of a Convenience of Government Legal or Convenience of Government Involuntary (COFGL/COFGI) hold.

(5) Up to 12 months for AR Marines to meet minimum obligated service requirements when Permanent Change-of-Station Orders or Permanent Change-of-Assignment Orders are issued by RA per reference (n). This extension may not carry a Marine past 18 years of active service.

b. Reserve Mobilization. Commanding Generals may approve an extension of enlistment for up to 12 months, on a one-time basis, per contract for SMCR/IRR/IMA Marines to meet minimum obligated service requirements for unit mobilization/deployment. The authorized term of this extension of enlistment shall not result in the Marine exceeding the following: service limitations for current grade, 48 months of total extensions on current contract, and/or 30 years of total federal service based on Pay Entry Base Date. An official naval correspondence letter containing the list of Marines in which this short-term extension of enlistment will be applied to, as well as the signed extension document (NAVMC 321A?), must be uploaded to the Retention management system prior to unit mobilization/deployment.

c. Prior Service Recruiter (PSR). PSRs will execute up to a 15 month extension of current enlistment contract for IRR Marines on a current MCR contract who join an SMCR/IMA unit. A 15 month extension of enlistment will provide the Marine sufficient time to meet reenlistment prerequisites and qualify for incentives if applicable. Additionally, the gaining command will be able to properly evaluate the Marine's performance for future service

within the Reserve component. This authority is contingent on current directives and compliance with the following conditions:

(1) The term of extension does not result in total service beyond service limitations.

(2) The total of multiple extensions does not exceed a total of 48 months on current contract.

Example: A Reserve Component Code K7 Marine who has an RECC of 3 March 2021 and a join date to an SMCR/IMA unit on 15 September 2020; the PSR would create and execute an extension for 10 months to ensure the Marine joins the unit with at least 15 months remaining on their current contract upon affiliation.

Required RECC once affiliated: 15 September 2020 (Affiliation date)
+ 15 months
14 December 2021

Amount of extension required: 14 December 2021
- 3 March 2021 (SNM's current RECC)
9 months, 11 days
10 month extension (Round up to whole month)

3. Commanding Officer's Recommendation

a. COs/I-Is are required to submit an extension request for all Marines, regardless of recommendation. The request must be submitted via the online retention database to RA for final determination.

b. All requests for retention must include the Marine's CO's recommendation. Refer to chapter 4, paragraph 9, subparagraph b of this Order for the recommendation and certification process.

4. Submission Procedures

a. Career Planners are required to thoroughly screen each Marine prior to creating a RELM. Proper screening ensures the Marine meets extension prerequisites.

b. Requests for extension will be submitted no later than 30 days prior to the Marine's current RECC/ECC/EAS unless otherwise authorized by current submission guidelines.

c. Forward requests for retention to RA via the online retention database.

d. All extension requests will include a complete Reserve RELM request form with supporting documentation as outlined by RA. RA will publish FY RELM submission guidelines with amplifying instructions on administrative requirements for submission. All requests must comply with the current FY RELM submission guidelines.

e. CPs desiring to check on the status of a retention request, should allow 30 working days following receipt by RA. After 30 working days, inquiries may be directed to RA via the CP SNCOIC. Contact the CP SNCOIC if

time becomes a detrimental factor for a particular RELM. The CP SNCOIC may contact the appropriate RA Retention Liaison for assistance.

f. Required entries by the CP are as follows:

(1) CPs will complete all sections as applicable on the RELM in the online retention database.

(2) Within the CP Comments section, the CP will address data that is not current or incorrect.

(3) CPs will state the nature of the request (e.g. requesting a 6 month extension in order to meet reenlistment prerequisites).

(4) Any waivers of retention prerequisites. Information required for waiver consideration will be attached to the RELM for RA decision.

(5) Any additional pertinent information not covered by specific instructions.

5. Administrative Procedures

a. COs/I-Is will certify all approved extensions by signing the extension authority prior to executing the authority. Extension shall not be executed when, in the opinion of the CO/I-I, the Marine authorized to be extended has failed to maintain the high standards of professionalism, personal performance, and core values after the authority for extension was granted. In such cases, the Command must immediately inform CMC (RA) of the circumstances surrounding the decision not to extend the Marine and provide justification. RA will provide instructions on the proper procedures to follow under such circumstances.

b. The Agreement to Extend Enlistment (NAVMC 321A) is the basic document used to execute voluntary extensions of enlistment. Do not use the agreement to extend an SMCR/IMA/IRR Marine's EAS for periods of ADOS or mobilization orders.

c. The NAMVC 321A will be completed in accordance with instructions provided on page 3 of NAVMC 321A. Additional completion instructions are as follows:

(1) The reference number on the approved RELM is the authority to be entered on the NAVMC 321A.

(2) Lump-Sum Leave election. Reserve Marines on Active Duty in excess of 30 days (including AR Marines) are authorized to sell back leave in conjunction with the 1st extension of an enlistment IAW reference (e). The local administrative section will finalize the process with the Marine's election of payment of lump sum leave in the case that a Marine signs an extension agreement more than 30 days from its effective date.

(3) Advance Leave election. Enter the following statement: "I elect to carry my entire advance leave balance forward to my new period of service" to substantiate the carry-forward election for Marines electing to carry forward the advance leave balance to the new period of service if: there is an advance leave balance on the effective date of extension, the advance leave balance is 30 days or less, it does not exceed the extension's

potential leave accrual, and the Marine does not elect to convert the advance leave balance to excess leave.

d. All documents should be created and reviewed prior to execution of the approved extension.

e. Execute the NAVMC 321A prior to or on the date of expiration of enlistment.

f. A copy of all executed documents will be uploaded to the online retention database.

g. NAVMC 321A will be distributed in accordance with appendix (c).

6. Denial of Further Service

a. Only CMC (RA) will deny further service to career or first term Marines. AR Marines denied further service may be authorized an extension of enlistment as appropriate to allow for transition time.

b. Per reference (q), the CMC (RA) will make an involuntary separations pay determination on each career Marine who is denied further active service. Involuntary separation pay is intended to assist Marines who are denied further service to facilitate a seamless transition to civilian life. Reference (t) contains the criteria used to determine the qualification for and level of involuntary separation pay for which the Marine is eligible (i.e., full, half, or zero).

c. CMC (RA) will assign a reenlistment code to each AR Marine who is denied further service per reference (q).

7. Cancellation of Voluntary Extension Agreement

a. Cancellation of voluntary extensions of enlistment is not authorized on or after the effective date. Separation of Marines in these cases may be accomplished only by discharge or transfer to the Reserve Retired List or FMCR. Requests for separation of Marines due to erroneous extensions of enlistment which are in effect must be submitted to the CMC (MMSR) per reference (q).

b. COs/I-Is may submit a request to CMC (RA) for cancellation of an extension of enlistment before its effective date under the following circumstances:

- (1) When the Marine's performance of duty warrants cancellation.
- (2) Due to unsatisfactory participation, as defined by reference (j).
- (3) When the Marine's physical condition so warrants. This includes assignment to weight control.
- (4) When the Marine is declared a deserter.
- (5) When a Marine has extended the enlistment for a specific reason shown on the extension agreement, but failed or did not receive the benefit.

(6) When Marines under their own accord become unqualified for any incentive granted in conjunction with the extension.

c. The following cancellation of voluntary extension authority is delegated by RA: Commanding Generals are authorized to cancel voluntary extensions of enlistment that are derived from a Local Command Authority per paragraph 2b. Authorities may be cancelled for the reasons listed in paragraph 7b. Authorities will be cancelled for cases in which Marines are no longer scheduled to mobilize based on changes to mobilization manning documents.

d. The Career Planner will write the word "cancelled" and state the reason for canceling the extension on the NAVMC 321A upon receiving approval from CMC (RA). The cancelled NAVMC 321A will be distributed in accordance with appendix (c).

e. Cancellation of an extension agreement does not prevent the execution of another extension agreement, provided the individual is eligible.

Chapter 6

Additional Retention Requests

1. General. Additional retention-related requests other than reenlistment or extension may be requested by a Marine. These requests can include, but not limited to:

- a. Lateral moves
- b. Career Progression courses
- c. Retention incentives
- d. Special Duty Assignment screening

2. Commanding Officer's Recommendation

a. COs/I-Is are required to submit all retention-related requests for all Marines, regardless of recommendation. The request must be submitted via the online retention database to RA for final determination.

b. All retention-related requests must include the Marine's CO's recommendation. Refer to chapter 4, paragraph 9, subparagraph b of this Order for the recommendation and certification process.

3. Submission Procedures

a. Career Planners are required to thoroughly screen each Marine prior to creating a RELM. Proper screening ensures the Marine meets specific retention-related request prerequisites.

b. Retention-related requests will be submitted no later than 30 days prior to the Marine's current RECC/ECC/EAS unless otherwise authorized by current submission guidelines.

c. Forward requests to RA via the online retention database.

d. All retention-related requests will include a complete Reserve RELM request form with supporting documentation as outlined by RA. RA will publish FY RELM submission guidelines and annual administrative messages with amplifying instructions on administrative requirements for submission. All requests must comply with the current FY RELM submission guidelines.

e. CPs desiring to check on the status of a retention-related request, should allow 30 working days following receipt by RA. After 30 working days, inquiries may be directed to RA via the CP SNCOIC. Contact the CP SNCOIC if time becomes a detrimental factor for a particular RELM. The CP SNCOIC may contact the appropriate RA Retention Liaison for assistance.

f. Required entries by the CP are as follows:

(1) CPs will complete all sections as applicable on the RELM in the online retention database.

(2) Within the CP Comments section, the CP will address data that is not current or incorrect.

(3) CPs shall state the nature of the request (e.g., requesting a lateral move to 4821).

(4) Any waivers of specific retention-related request prerequisites. Information required for waiver consideration will be attached to the RELM for consideration by RA.

(5) Any additional pertinent information not covered by specific instructions.

4. Administrative Procedures

a. COs/I-Is shall certify all retention-related packages by signing the online retention database authority prior to executing the authority. Authority shall not be executed when, in the opinion of the CO/I-I, the Marine authorized for a retention-related request has failed to maintain the high standards of professionalism, personal performance, and core values after the authority was granted. In such cases, the Command must immediately inform CMC (RA) of the circumstances surrounding the decision not to execute the authority and provide justification. RA shall provide instructions on the proper procedures to follow under such circumstances.

b. The online retention database authority is the document used to execute approved retention-related requests without additional contractual time.

c. All documents should be reviewed prior to execution of the approved retention-related request.

d. Execute the retention-related authority prior to or on the date of expiration of the authority.

e. A copy of all executed documents will be uploaded to the online retention database.

f. Executed online retention database authority will be distributed in accordance with appendix (c).

Chapter 7

Records Management

1. General. Retention and interview documents must be prepared and maintained in accordance with their National Archives and Records Administration (NARA)-approved schedules in order to document the transaction of a Marine's retention request. All documents pertaining to a Marine's retention request will be uploaded within the online retention database and distributed in accordance with appendix (c). For records management policy and guidance, see references (ae) and (aj).

2. Working Files. These consist of Individual Case Files and Interview Records.

a. Individual Case Files (ICF). An ICF will be created for all reserve retention related requests. The Reserve Electronic RELM Tracker (R-ERT) is used once an ICF has been initiated and will be maintained by updating the status of all RELM requests. The RERT will be maintained for the current fiscal year plus 2 previous fiscal years. ICFs are maintained and filed alphabetically in the following six sections:

(1) Routing. Used to track a RELM request as it is routed through the chain of command. An ICF will be opened/started with the Marine receiving the RELM request. The Marine requesting retention will not receive the RELM pages designated for the SgtMaj, Executive Officer and Commanding Officer/Commander. Once the Marine has routed the request through Company/Battery/section, the Marine will return the RELM request to the Career Planner for further processing. The Career Planner will track the request and follow-up with the Marine immediately if the RELM has not been returned per the agreed upon timeframe. ICFs will be retained and disposed of IAW reference (ak).

(2) Pending. Used once the RELM request has been routed through command and submitted to HQMC via the online retention database.

(3) Approved/Disapproved. Used once approval/disapproval is received from HQMC. The ICF will remain in this section until the Marine executes the authority or accepts disapproval and RELM has been acknowledged. Disapprovals will move to closed section after acknowledging and no further action is required.

(4) Admin. Once TFRS authority has been executed and awaiting the appropriate unit diary entries.

(5) SDA. Once a Marine receives orders to SDA, the ICF will be filed based on the month recertification is due.

(6) Closed. Files will be moved to this section once all actions have been completed.

b. Interview Records

(1) Results of all interviews that are conducted between the individual Marine, CP, and CO, will be captured and maintained within the IMM.

(2) In instances where the use of the IMM is not feasible or practical, the Reserve Career Planning Contact Record is authorized. Interview notes captured on the Reserve Career Planning Contact Record will be transferred into the IMM once available.

Appendix A

Glossary of Terms and Definitions

1. Active Duty for Operational Support (ADOS). Voluntary AD which is authorized for Reserve Marines to support existing or emerging requirements.
2. Active Reserve Alignment Plan (ARAP). An annual retention plan established by CMC (RA) to balance the AR enlisted career force inventory while retaining quality Marines.
3. Career Enhancement Training. Training that leads to higher degree of proficiency within an occupational field, but does not change the Marine's primary MOS.
4. Career Progression Training. Training that leads to higher degree of proficiency within an occupational field. Completion of this course may change the Marine's primary MOS.
5. Commanding Officer/Inspector-Instructor. The lowest ranking officer who possesses special courts-martial convening authority in accordance with Uniformed Code of Military Justice. Normally resides with the battalion or squadron Commanding Officer/Inspector-Instructor or higher.
6. Effective Date. The date on which the term of the contract or agreement to extend enlistment commences or becomes effective.
7. Execution Date. The date a contract, or an agreement to extend an enlistment, is subscribed and sworn to (the date signed). On this date, the contract and agreement to extend an enlistment is valid. The execution date must precede the effective date for all reenlistments or extensions.
8. Expiration of Active Service (EAS). The date on which active duty terminates.
9. Expiration of Current Contract (ECC). The date the current enlistment contract expires excluding voluntary extensions of enlistment that have not become effective. Periods of time lost will automatically extend the ECC by the number of days lost.
10. Expiration of Obligated Service (EOS)/Military Service Obligation (MSO). The termination date for the service obligation under the terms of the Military Selective Service Act (MSS ACT) per reference (w). Individuals who become members of the Armed Forces sign a contract incurring a military obligation known as an MSO. Any part of this service that is not served on AD or ADT will be performed in a Reserve component.
11. For Further Observation (FFO). This retention option is used only for Marines who have jeopardy on their current contract and need additional service for observation.
12. First Term Obligation Plan (FTOP). FTOP is the retention program used to incentivize and obligate First Term Marines to meet career force requirements. The program is applicable to SMCR/IRR component Marines who are serving on their initial enlistment contract (MSO) and initiate or extend a drilling obligation.

13. Mandatory Drill Participation Stop Date (MDPSD). The date a SMCR Marine is no longer obligated to attend drills. This date is based on the terms of the original enlistment contract or any extensions to the MDPSD in exchange for a retention-related request.

14. Online Collaboration Tools. Software and online services that allow personnel to communicate and work together privately regardless of physical location. This includes but not limited to utilization of video teleconference (VTC), Defense Collaboration Services (DCS) and communication between official Department of Defense email accounts while complying with existing laws and policies pertaining to data security.

15. Pay Entry Base Date (PEBD). The basic date for computing a Marine's creditable service. PEBD is used to determine the date when a Marine is entitled to increased basic pay.

16. Reserve Expiration of Current Contract (RECC). The date the current Reserve enlistment contract expires including voluntary extensions of enlistment that have been executed. Periods of time lost will automatically extend the RECC by the number of days lost.

17. Reserve Electronic RELM Tracker (R-ERT). An electronic document that is used to track all reserve retention related and SDA request submitted to HQMC.

18. Statement of Service (SOS). This is a chronological listing of all periods of service including broken service and other services.

19. Subsequent Term Obligation Plan (STOP). STOP is the retention program used to incentivize and obligate career Marines while improving retention and promotion tempos across all MOSs. This program is applicable to SMCR/IRR component Marines who passed their initial enlistment contract (MSO) and initiate or extend a drilling obligation.

20. Unit Hierarchy. Resident within the online retention database, the unit hierarchy displays all units within the user's scope of permissions. The Unit Hierarchy will be used for assigning units, changing RELM views and changing Interview views. The Hierarchy contains all Command Structure within the Marine Corps in order to automate the RELM routing process. The Hierarchy also offers the necessary functionality to create and maintain the hierarchy using automated and manual tools and permit the assignment of users to hierarchy nodes.

Appendix B

Glossary of Acronyms and Abbreviations

1. The following is a list of abbreviations associated with the Reserve component and used frequently in this Manual.

AC.....Active Component
AD.....Active Duty
ADOS.....Active Duty for Operational Support
ADT.....Active Duty Training
ADPE.....Automatic Data Processing Equipment
AFADBD.....Armed Forces Active Duty Base Date
AFQT.....Armed Forces Qualification Test
AFTP.....Additional Flying Training Period
AOS.....Additional Obligated Service
AR.....Active Reserve
ARAP.....Active Reserve Alignment Plan
ARCR.....Annual Retirement Credit Report
ASL.....Active Status List (Standby Reserve)
AT.....Annual Training
ATP.....Additional Training Period
BIC.....Billet Identification Number
CEI.....Civilian Employment Information
CG.....Commanding General
CO.....Commanding Officer
CMC.....Commandant of the Marine Corps
COFGI.....Convenience of Government Involuntary
COFGL.....Convenience of Government Legal
COFGM.....Convenience of Government Medical
COMP CODE.....Component Code
COMMARFORRES.....Commander, Marine Forces Reserve
CONUS.....Continental United States
CP.....Career Planner
CRCR.....Career Retirement Credit Report
CTO.....Commercial Travel Office
DEP.....Delayed Entry Program
DOD.....Department of Defense
DUI.....Driving Under the Influence
DWI.....Driving While Intoxicated
EAD.....Extended Active Duty
EAS.....End of Active Service
ECC.....End of Current Contract
EFC.....Employing Force Command
ELTA.....Entry Level Training Assignment
EOS.....Expiration of Obligated Service
FFO.....For Further Observation
FHG.....Force Headquarters Group
FMCR.....Fleet Marine Corps Reserve
FRAAP.....Force Readiness Assistance and Assessment Program
FTOP.....First Term Obligation Plan
HIV.....Human Immunodeficiency Virus
HQMC.....Headquarters Marine Corps
HTC.....Home Training Center
I-I.....Inspector-Instructor
IACN.....Individual Activity Code Numbers
IAD.....Initial Active Duty

IADT.....Initial Active Duty Training
IDT.....Inactive Duty Training
IIADT.....Incremental Initial Active Duty for Training
IMA.....Individual Mobilization Augmentee
IRR.....Individual Ready Reserve
ISL.....Inactive Status List, Standby Reserve
IST.....Initial Skill Training
LOD.....Line of Duty
M4L.....Marine For Life
MarDiv.....Marine Division
MARFORRES.....Marine Forces Reserve
MAW.....Marine Air Wing
MCIRSA.....Marine Corps Individual Reserve Support Activity
MCMS.....Marine Corps Mobilization Station
MCP-R.....Meritorious Commissioning Program - Reserve
MCR.....Marine Corps Reserve
MCRC.....Marine Corps Recruiting Command
MCTFS.....Marine Corps Total Force System
MCTFSCODESMAN.....Marine Corps Total Force System Codes Manuel
MCTFSPRIUM.....Marine Corps Total Force System Personnel Reporting
 Instructions User's Manual
MDPSD.....Mandatory Drill Participation Stop Date
MEPS.....Military Entry Processing Station
MFR.....Marine Forces Reserve
MGIB.....Montgomery GI Bill
MGIB-SR.....Montgomery GI Bill - Selected Reserve
MLG.....Marine Logistics Group
MMSR.....Manpower Management Separation and Retirement Branch
MOL.....Marine On-Line
MOS.....Marine Occupational Specialty
MOJT.....Managed On-the-Job Training
MPP.....Manpower Plans and Policy Branch
MSC.....Major Subordinate Command
MSO.....Military Service Obligation
MTU.....Mobilization Training Unit
M&RA.....Manpower and Reserve Affairs
NJP.....Non Judicial Punishment
NOE.....Notice of Eligibility
NPQ.....Not Physically Qualified
NPS.....Non prior Service Personnel
OCONUS.....Outside Continental United States
ODSE.....Operational Data Store Enterprise
OIC.....Officer In Charge
OJT.....On-the-Job Training
OMPF.....Official Military Personnel File
PEB.....Physical Evaluation Board
PEBD.....Pay Entry Base Date
PFT.....Physical Fitness Test
PLC.....Platoon Leaders Class
PME.....Professional Military Education
PMOS.....Primary Military Occupational Specialty
PS.....Prior Service Personnel
PSOP.....Prior service Other Service
PSR.....Prior Service Recruiters
PSTA.....Prior Service Training Assignment
PWST.....Peacetime wartime Support Team
R-ERT.....Reserve Electronic RELM Tracker

RA.....Reserve Affairs Division (HQMC)
RAM.....Reserve Affairs Management
RAP.....Reserve Affairs Plans and Policy
RC.....Reserve Component
RCPCR.....Reserve Career Planner Contact Record
RECC.....Reserve End of Current Contract
RECP.....Reserve Enlisted Commissioning Program
RELM.....Reenlistment Extension Lateral Move
RIDT.....Rescheduled Inactive Duty Training
RMP.....Readiness Management Period
ROCP.....Reserve Officer Commissioning Program
ROEP.....Reserve Optional Enlistment Program
RQS.....Reserve Qualification Summary
RSU.....Reserve Support unit
SMCR.....Selected Marine Corps Reserve
SNCOIC.....Staff Non-Commissioned Officer In Charge
SOS.....Statement of Service
SPD.....Separation Program Designator
SRIP.....Selected Reserve Incentive Program
SSN.....Social security Number
STOP.....Subsequent Term Obligation Plan
SWAT.....Separate written Agreement to Train
T/O.....Table of Organization
TAD.....Tour of Additional Duty
TCS.....Tentative Characterization of Service
TFSD.....Total Force Structure Division
TFRS.....Total Force Retention System
UCMJ.....Uniform Code of Military Justice

Appendix C

Distribution Instructions

CAREER PLANNING FORM DISTRIBUTION INSTRUCTIONS			
For Marines with Electronic Service Record Books (E-Record)			
Form Name	The original is	The first copy is	The second copy is
DD Form 4	Delivered to the Marine on the date of action.	Delivered to the Marine's local administration office for unit diary entry and inclusion in the Marine's E-Record.	Uploaded into the online retention database upon acknowledgement of the RELM request authority and in accordance with references (ae), (aj), and ak).
NAVMC 321A			
Online Retention Database Authority/Response			
Retention-related SOU			
**Copies will contain signatures.			